HOUSING MARKET INFORMATION

# SENIORS' HOUSING REPORT
## Canada Highlights

CANADA MORTGAGE AND HOUSING CORPORATION

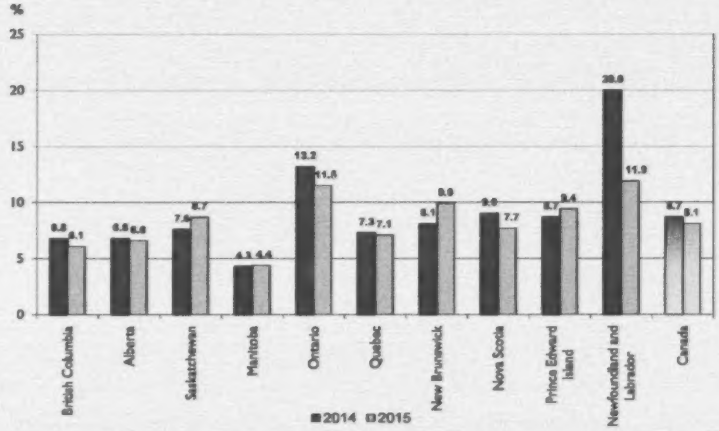
Date Released: 2015

## Highlights

- The vacancy rate in seniors' housing residences in Canada decreased slightly over the past year, reaching 8.1 per cent in 2015, compared to 8.7 per cent in 2014.
- The increase in the total number of spaces for seniors in 2015 was slightly outpaced by an increase in the total number of residents, which led to a decrease in the overall vacancy rate.
- The average rent for bachelor units and private rooms, where at least one meal is included in the rent, rose from $2,043 per month in 2014, to $2,107 in 2015. Ontario posted the highest average rent at $2,815, while Québec had the lowest at $1,521.

Figure 1

**Vacancy Rates of All Spaces, Canada and Provinces, 2014 and 2015**




Source: CMHC Seniors' Housing Survey

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## Universe

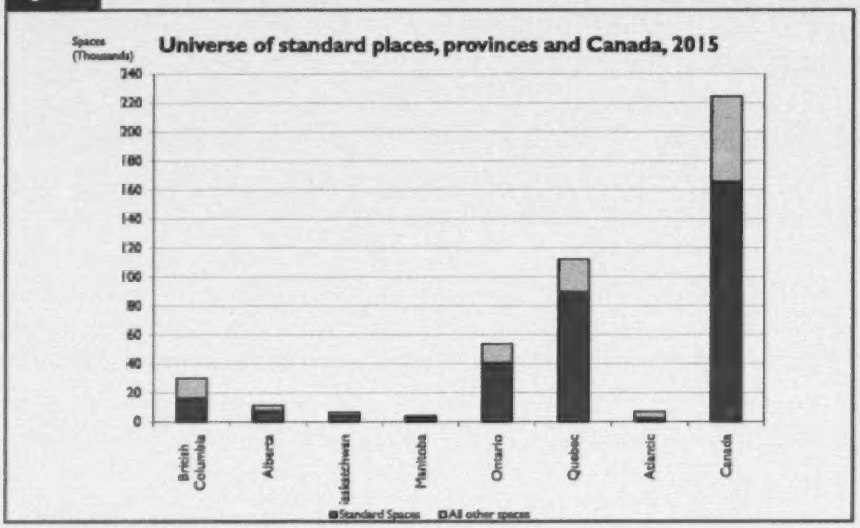
According to the National Seniors' Housing Survey conducted in 2015 by Canada Mortgage and Housing Corporation (CMHC), 224,962 seniors lived in the 2,794 residences surveyed.

The number of spaces in residences increased (+2.4 per cent), rising from 219,052 spaces in 2014 to 224,342 in 2015, 73.8 per cent being standard spaces.

The number of residents increased by 2.9 per cent over 2014, while the estimated population aged 75+ increased by 2.1 per cent over the same period.

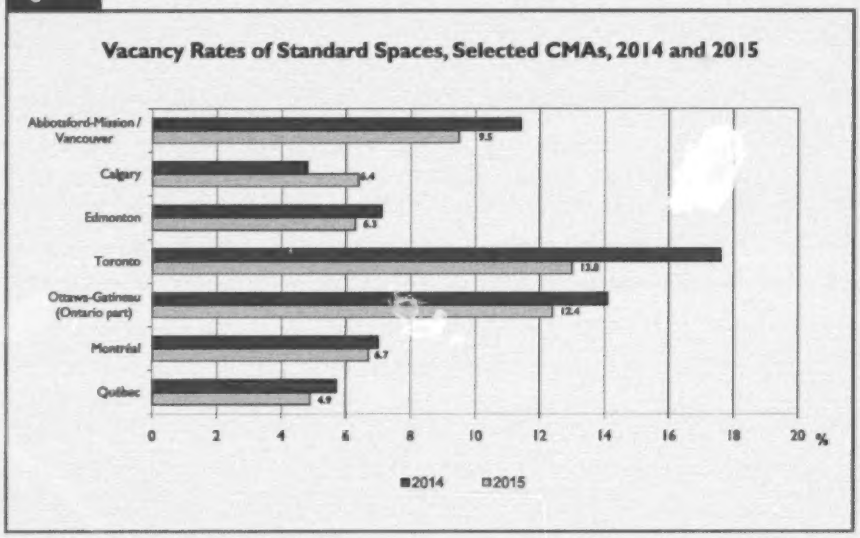
Nevertheless, the capture rate, which is the percentage of the seniors' population aged 75 years and over who occupied a standard or non-standard space, held steady at 8.9 per cent in 2015, compared to 2014. The capture rate was the highest in Quebec (18.5 per cent), while it was the lowest in Nova Scotia (1.9 per cent). While in Québec there is a high degree of specifically targeted marketing of residences, this has not been generally observed elsewhere in the country.

Figure 2




Source: CMHC Seniors' Housing Survey

Figure 3




Source: CMHC Seniors' Housing Survey

## Vacancy rates

### Average vacancy rate for all standard[1] and non-standard spaces

Overall, the vacancy rate for all standard and non-standard spaces decreased slightly, falling to 8.1 per cent in 2015 from 8.7 per cent in 2014. The increase in the number of residents outpaced the increase in the number of spaces offered, which contributed to the market tightening slightly.

### Vacancy rate for standard spaces falls from 9.7 to 8.9 per cent

The national vacancy rate for standard spaces in seniors' housing residences decreased over the past year, reaching 8.9 per cent in 2015 compared to 9.7 per cent in 2014.

Among the provinces, the vacancy rates were highest in Ontario (12.1 per cent) and in Saskatchewan (10.6 per cent). On the other hand, the lowest vacancy rates were posted in Manitoba (4.6 per cent) and Quebec (7.3 per cent).

At the census metropolitan area (CMA) level, the largest proportions

[1] A standard space is one that is occupied by a resident paying market rent and who does not receive heavy care (defined as 1.5 or more hours of care per day). A non-standard space is one in which the residents are receiving heavy care, spaces being used for respite and non-market spaces. Refer to page 10 for more details.

of vacant spaces were recorded in Windsor (20.1 per cent) and in Kitchener-Cambridge-Waterloo (15.2 per cent), while the lowest vacancy rates were posted in Greater Sudbury (3.5 per cent) and Oshawa (4.3 per cent).

The vacancy rates in the seven largest CMAs are presented in figure 3. Among this group, Québec had the lowest vacancy rate in 2015 (4.9 per cent), while Toronto (13.0 per cent) posted the highest vacancy rate, although it has decreased since 2014. Vacancy rates for seniors' residences are typically higher than the vacancy rates posted in the traditional rental market, as a result of higher rents and more frequent turnover.

### Average vacancy rate for non-standard spaces rises from 3.8 to 4.5 per cent

In 2015, across the country, the average vacancy rate for non-standard spaces reached 4.5 per cent, up from 3.8 per cent in 2014, bringing it closer to the vacancy rate among standard spaces.

The lower vacancy rate for non-standard spaces can be attributed to the nature of those spaces. Non-market spaces are typically fully occupied, while heavy care spaces are sometimes temporarily used. This type of unit would then be changed to a standard space when vacated[2].

## Average rents

### Average monthly rent for standard spaces rises slightly

The average rent for bachelor units and private rooms, where at least one meal is included in the rent, rose to $2,107 per month in 2015, compared to $2,018 in 2014.

Among the provinces, the lowest average rents were posted in Quebec ($1,521), while the highest average rents were recorded in Ontario ($2,815) and Nova Scotia ($2,796).

At the CMA level, the average monthly rents for bachelor units and private rooms were lowest in Saguenay ($1,244), Sherbrooke ($1,367) and Trois-Rivières ($1,596) and highest in Oshawa ($3,246), Toronto ($3,134) and Ottawa ($3,134).

Given the additional amenities and services provided in most residences, rents are typically higher in seniors' residences than in the conventional rental market. Rents are directly influenced by the type of service offered. For example, for units offering heavy care services, the average rent was $3,520 in 2015, down from $3,652 in 2014. The national average decrease reflected lower rents in Ontario and Saskatchewan. The average monthly rent for heavy care spaces was the lowest in Quebec ($2,881), and the highest in British Columbia ($6,011).

### Rent distribution

In Canada, slightly more than a third (34.9 per cent) of standard spaces were rented for $2,500 or more a month, while 25.9 per cent were rented for less than $1,500 a month. The lower overall rents in Quebec have a direct impact on the rent distribution. Nearly half of all the spaces are located in Québec and 44.7 per cent of the standard spaces on the Quebec market posted an average rent of less than $1,500 per month. On the other hand, only 5.4 per cent of the spaces in seniors' residences in that province posted an average rent of $2,500 or more per month. In contrast, Ontario had 2.0 per cent of the spaces rented for less than $1,500 per month, while 77.0 per cent of units had an average rent of $2,500 or more per month.

### Wide range of services and amenities available

In order to meet the evolving demand, residences offer a wide variety of services and amenities.

The most popular amenities offered to seniors in some residences are a 24-hour call bell service, an on-site nurse service, transportation and exercise facilities. Movie theatre, swimming pools and on-site pharmacies were the less common amenities (see Figure 4).

Figure 4

| Proportion (%) of Structures with Access to Selected Amenities | |
|---|---|
| 24-hour call bell | 95.4 |
| Nurse on site | 50.6 |
| Transportation | 43.2 |
| Exercise facilities | 40.4 |
| Movie theatre | 28.7 |
| Swimming pool | 10.3 |
| Pharmacy | 9.2 |

[2]A non-market space is one where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized. A heavy care space is one where the residence provides 1.5 hours or more of health care per day to the resident. Examples include Alzheimer, dementia and mobility support residents. Heavy care space estimates for occupied spaces only include those where the resident is required to pay for a high level of care.

## 1.1 Vacancy Rates (%) and Universe for Provinces and Selected Major Centres

| | Vacancy Rate | | | | | | Universe | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Standard Spaces | | All Other Spaces | | Total | | Standard Spaces | Non-Standard Spaces | Unknown[1] | Total |
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | | | | |
| Newfoundland and Labrador | 22.6 | 8.5 | 18.3 | 13.3 | 20.0 | 11.9 | 520 | 1,189 | 590 | 2,299 |
| Prince Edward Island | 9.0 | ** | 8.0 | 7.7 | 8.7 | 9.4 | 115 | 214 | 624 | 953 |
| Nova Scotia | 9.1 | 7.9 | ** | 3.1 | 9.0 | 7.7 | 1,107 | 66 | 270 | 1,443 |
| New Brunswick | 8.7 | ** | 2.7 | ** | 8.1 | 9.9 | 807 | 323 | 1,010 | 2,140 |
| Montreal CMA | 7.0 | 6.7 | 6.6 | 8.1 | 6.9 | 6.9 | 36,877 | 6,708 | 2,955 | 46,540 |
| Ottawa - Gatineau CMA (Que. part) | 9.4 | 8.1 | 7.3 | 3.6 | 9.2 | 7.6 | 2,776 | 413 | - | 3,189 |
| Québec CMA | 5.7 | 4.9 | 2.4 | 3.6 | 5.3 | 4.7 | 11,119 | 1,993 | 618 | 13,730 |
| Saguenay CMA | 8.0 | 8.6 | 11.0 | 3.3 | 8.3 | 7.8 | 2,163 | 354 | 45 | 2,562 |
| Sherbrooke CMA | 7.9 | 7.7 | 0.9 | 3.5 | 7.4 | 7.3 | 3,514 | 396 | 115 | 4,025 |
| Trois Rivières CMA | 13.6 | 13.2 | 5.2 | 5.6 | 13.2 | 12.2 | 3,711 | 528 | 91 | 4,330 |
| Quebec | 7.5 | 7.3 | 4.8 | 5.9 | 7.3 | 7.1 | 89,761 | 14,765 | 7,447 | 111,973 |
| Barrie CMA | 8.9 | 10.8 | 1.5 | 12.2 | 8.3 | 11.0 | 546 | 82 | 228 | 856 |
| Brantford CMA | 4.9 | 11.1 | ** | 0.0 | 4.5 | 10.2 | 740 | 62 | - | 802 |
| Guelph CMA | 9.4 | 8.9 | 3.1 | ** | 8.3 | 8.5 | 619 | 54 | 251 | 924 |
| Hamilton CMA | 11.0 | 9.7 | 6.9 | 7.0 | 10.8 | 9.5 | 2,352 | 146 | 410 | 2,908 |
| Kingston CMA | 13.9 | 9.4 | ** | ** | 13.5 | 9.2 | 527 | 15 | 294 | 836 |
| Kitchener-Cambridge-Waterloo CMA | 17.8 | 15.2 | 12.8 | 20.7 | 17.5 | 15.7 | 2,142 | 218 | 267 | 2,627 |
| London CMA | 17.3 | 12.9 | 4.9 | ** | 16.9 | 12.1 | 1,849 | 108 | 94 | 2,051 |
| St. Catharines-Niagara CMA | 12.6 | 9.6 | 3.0 | ** | 12.1 | 9.5 | 1,236 | 21 | 1,127 | 2,384 |
| Oshawa CMA | 12.6 | 4.3 | 4.3 | 7.0 | 12.1 | 4.5 | 1,025 | 86 | 211 | 1,322 |
| Ottawa - Gatineau CMA (Ont. part) | 14.1 | 12.4 | 8.0 | 0.9 | 13.3 | 11.3 | 5,012 | 554 | 1,060 | 6,626 |
| Peterborough CMA | 6.1 | 4.6 | ** | ** | 5.8 | 4.4 | 543 | 25 | 467 | 1,035 |
| Greater Sudbury CMA/Grand Sudbury CMA | 4.6 | 3.5 | ** | ** | 4.3 | 3.1 | 577 | 62 | 110 | 749 |
| Thunder Bay CMA | ** | ** | ** | ** | ** | ** | 334 | 9 | 82 | 425 |
| Toronto CMA | 17.6 | 13.0 | 3.7 | 2.6 | 16.3 | 12.1 | 10,980 | 1,080 | 2,299 | 14,359 |
| Windsor CMA | 10.0 | 20.1 | 37.3 | 5.3 | 13.3 | 18.5 | 1,413 | 170 | 185 | 1,768 |
| Ontario | 13.9 | 12.1 | 6.2 | 4.1 | 13.2 | 11.5 | 40,777 | 3,382 | 9,521 | 53,680 |
| Manitoba | 4.6 | 4.6 | ** | ** | 4.3 | 4.4 | 3,586 | 192 | 261 | 4,039 |
| Regina CMA | 6.1 | 6.8 | ** | 1.6 | 5.2 | 5.8 | 1,104 | 255 | - | 1,359 |
| Saskatoon CMA | 8.6 | 9.6 | 0.8 | 2.0 | 4.9 | 7.0 | 1,828 | 986 | 130 | 2,944 |
| Saskatchewan | 9.9 | 10.6 | 2.6 | 3.5 | 7.6 | 8.7 | 4,565 | 1,673 | 240 | 6,478 |
| Calgary CMA | 4.8 | 6.4 | 0.7 | 5.8 | 4.1 | 6.3 | 2,747 | 796 | 102 | 3,645 |
| Edmonton CMA | 7.1 | 6.3 | 1.1 | 0.6 | 5.4 | 4.3 | 2,920 | 1,512 | - | 4,432 |
| Alberta | 8.5 | 8.1 | 2.0 | 3.3 | 6.8 | 6.6 | 7,600 | 3,322 | 221 | 11,143 |
| Kelowna CMA | 8.5 | 7.5 | 0.5 | 0.0 | 5.9 | 5.2 | 1,646 | 730 | - | 2,376 |
| Abbotsford-Mission CMA/Vancouver CMA | 11.4 | 9.5 | 1.0 | 2.2 | 6.9 | 6.4 | 7,375 | 5,328 | 348 | 13,051 |
| Victoria CMA | 10.5 | 7.9 | 1.4 | 2.1 | 7.0 | 5.5 | 1,944 | 1,366 | 378 | 3,688 |
| British Columbia | 10.9 | 9.1 | 1.4 | 2.0 | 6.8 | 6.1 | 16,636 | 12,517 | 1,041 | 30,194 |
| **Canada** | **9.7** | **8.9** | **3.8** | **4.5** | **8.7** | **8.1** | **165,474** | **37,643** | **21,225** | **224,342** |

[1]An unknown space is in a residence where there was no response and it can either be a standard or a non-standard space.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 1.2 Number of Units and Proportion of Overall Universe for Bachelor Units and Private Rooms[1] where Meals are included in Rent[2] Provinces and Selected Major Centres

| | Vacancy Rate | | Average Rent | | Number of Units[3] | Proportion of Overall Universe |
|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | | |
| Newfoundland and Labrador | 12.2 | ** | 2,105 | ** | ** | ** |
| Prince Edward Island | 11.6 | ** | 2,782 | ** | ** | ** |
| Nova Scotia | 7.5 | 12.5 | 2,707 | 2,796 | 382 | 26.5 |
| New Brunswick | 7.9 | ** | 2,395 | ** | ** | ** |
| Montreal CMA | 8.9 | 9.6 | 1,650 | 1,677 | 9,217 | 19.8 |
| Ottawa - Gatineau CMA (Que. part) | 11.0 | 7.7 | 1,770 | 1,818 | 832 | 26.1 |
| Québec CMA | 7.8 | 7.5 | 1,692 | 1,675 | 3,513 | 25.6 |
| Saguenay CMA | 8.6 | 10.4 | 1,246 | 1,244 | 796 | 31.1 |
| Sherbrooke CMA | 10.1 | 11.0 | 1,308 | 1,367 | 1,841 | 45.7 |
| Trois Rivières CMA | 11.6 | 14.8 | 1,575 | 1,596 | 1,261 | 29.1 |
| Quebec | 9.0 | 9.6 | 1,497 | 1,521 | 36,219 | 32.3 |
| Barrie CMA | 8.5 | 10.9 | 2,746 | 2,697 | 596 | 69.7 |
| Brantford CMA | 3.7 | 8.0 | 2,639 | 2,689 | 497 | 62.0 |
| Guelph CMA | 9.2 | 8.4 | 2,981 | 2,933 | 442 | 47.9 |
| Hamilton CMA | 11.8 | 9.3 | 2,862 | 2,859 | 1,820 | 62.6 |
| Kingston CMA | 12.3 | 12.0 | 2,985 | 2,992 | 343 | 41.0 |
| Kitchener-Cambridge-Waterloo CMA | 11.8 | 11.7 | 2,979 | 3,021 | 1,396 | 53.1 |
| London CMA | 18.4 | 15.0 | 2,839 | 2,861 | 806 | 39.3 |
| St. Catharines-Niagara CMA | 9.4 | 9.2 | 2,262 | 2,402 | 1,203 | 50.5 |
| Oshawa CMA | 13.9 | 4.7 | 2,972 | 3,246 | 533 | 40.3 |
| Ottawa - Gatineau CMA (Ont. part) | 12.7 | 10.7 | 3,017 | 3,134 | 3,831 | 57.8 |
| Peterborough CMA | 4.9 | 0.6 | 2,895 | 2,704 | 585 | 56.5 |
| Greater Sudbury CMA/Grand Sudbury CMA | 5.5 | ** | 2,420 | ** | ** | ** |
| Thunder Bay CMA | ** | ** | ** | ** | ** | ** |
| Toronto CMA | 18.0 | 14.7 | 3,206 | 3,198 | 5,857 | 40.8 |
| Windsor CMA | 7.6 | 23.2 | 2,492 | 2,588 | 613 | 34.7 |
| Ontario | 12.8 | 11.7 | 2,776 | 2,815 | 27,799 | 51.8 |
| Manitoba | 5.9 | 3.9 | 1,815 | 2,165 | 211 | 5.2 |
| Regina CMA | 7.2 | 9.1 | 3,105 | 3,091 | 475 | 35.0 |
| Saskatoon CMA | 11.4 | 14.6 | 2,636 | 2,600 | 779 | 26.5 |
| Saskatchewan | 11.4 | 13.6 | 2,536 | 2,526 | 2,518 | 38.9 |
| Calgary CMA | 5.8 | 6.5 | 2,789 | 2,860 | 902 | 24.8 |
| Edmonton CMA | 11.5 | 16.4 | 1,855 | 2,311 | 415 | 9.4 |
| Alberta | 10.1 | 10.4 | 2,329 | 2,515 | 1,748 | 15.7 |
| Kelowna CMA | 15.0 | 9.2 | 1,792 | 1,832 | 282 | 11.9 |
| Abbotsford-Mission CMA/Vancouver CMA | 9.3 | 10.6 | 2,262 | 2,242 | 1,605 | 12.3 |
| Victoria CMA | 17.6 | 12.3 | 2,146 | 2,201 | 355 | 9.6 |
| British Columbia | 10.5 | 9.1 | 2,021 | 2,035 | 3,532 | 11.7 |
| **Canada** | **10.5** | **10.5** | **2,043** | **2,107** | **72,615** | **32.4** |

[1]These include single-occupancy room and board Units in Quebec.

[2]At least one meal must be included in the typical rent charged for the majority of units.

[3]Weighted number of units based on survey responses.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces for Selected Provinces[1]

| | Vacancy Rate[2] | | Average Rent[2] | |
|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 |
| Quebec | 5.0 | 5.7 | 2,654 | 2,881 |
| Ontario | 7.9 | 5.4 | 4,640 | 4,454 |
| Manitoba | ** | ** | ** | ** |
| Saskatchewan | 6.0 | 8.9 | 4,309 | 4,194 |
| Alberta | 2.2 | 4.2 | 4,329 | 4,450 |
| British Columbia | 1.5 | 1.8 | 5,999 | 6,011 |
| **Canada** | **3.7** | **4.5** | **3,652** | **3,520** |

[1] The low number of heavy care spaces in the Atlantic Region precludes the publication of data in that region for reasons of confidentiality.

[2] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 2.1 Universe of Total Spaces for Provinces and Selected Major Centres by Unit Type

| | Standard Units | | Non-Standard Units | | Unknown Units | | Total |
|---|---|---|---|---|---|---|---|
| | Semi-private, Ward, Bachelor Units and Private Rooms[1] | One-bedroom plus[2] | Semi-private, Ward, Bachelor Units and Private Rooms[1] | One-bedroom plus[2] | Semi-private, Ward, Bachelor Units and Private Rooms[1] | One-bedroom plus[2] | |
| Newfoundland and Labrador | 216 | 304 | 628 | 561 | 514 | 76 | 2,299 |
| Prince Edward Island | 27 | 88 | 111 | 103 | 506 | 118 | 953 |
| Nova Scotia | 323 | 784 | 32 | 34 | 24 | 246 | 1,443 |
| New Brunswick | 131 | 676 | 29 | 294 | 281 | 729 | 2,140 |
| Montreal CMA | 12,742 | 24,135 | 6,329 | 379 | 1,670 | 1,285 | 46,540 |
| Ottawa - Gatineau CMA (Que. part) | 1,031 | 1,745 | 386 | 27 | - | - | 3,189 |
| Québec CMA | 4,138 | 6,981 | 1,845 | 148 | 343 | 275 | 13,730 |
| Saguenay CMA | 1,104 | 1,059 | 289 | 65 | 45 | - | 2,562 |
| Sherbrooke CMA | 1,967 | 1,547 | 373 | 23 | 84 | 31 | 4,025 |
| Trois Rivières CMA | 1,704 | 2,007 | 527 | 1 | 88 | 3 | 4,330 |
| Quebec | 40,261 | 49,500 | 13,810 | 955 | 3,992 | 3,455 | 111,973 |
| Barrie CMA | 485 | 61 | 82 | - | 72 | 156 | 856 |
| Brantford CMA | 558 | 182 | 55 | 7 | - | - | 802 |
| Guelph CMA | 363 | 256 | 48 | 6 | 244 | 7 | 924 |
| Hamilton CMA | 1,603 | 749 | 136 | 10 | 282 | 128 | 2,908 |
| Kingston CMA | 264 | 263 | 8 | 7 | 94 | 200 | 836 |
| Kitchener-Cambridge-Waterloo CMA | 1,317 | 825 | 189 | 29 | 124 | 143 | 2,627 |
| London CMA | 779 | 1,070 | 75 | 33 | 51 | 43 | 2,051 |
| St. Catharines-Niagara CMA | 688 | 548 | 18 | 3 | 822 | 305 | 2,384 |
| Oshawa CMA | 496 | 529 | 69 | 17 | 106 | 105 | 1,322 |
| Ottawa - Gatineau CMA (Ont. part) | 3,339 | 1,673 | 449 | 105 | 498 | 562 | 6,626 |
| Peterborough CMA | 335 | 208 | 25 | - | 165 | 302 | 1,035 |
| Greater Sudbury CMA/Grand Sudbury CMA | 411 | 166 | 8 | 54 | 110 | - | 749 |
| Thunder Bay CMA | 91 | 243 | 3 | 6 | 66 | 16 | 425 |
| Toronto CMA | 5,065 | 5,915 | 907 | 173 | 977 | 1,322 | 14,359 |
| Windsor CMA | 597 | 816 | 146 | 24 | 168 | 17 | 1,768 |
| Ontario | 23,988 | 16,789 | 2,831 | 551 | 5,727 | 3,794 | 53,680 |
| Manitoba | 182 | 3,404 | 192 | - | 98 | 163 | 4,039 |
| Regina CMA | 475 | 629 | 197 | 58 | - | - | 1,359 |
| Saskatoon CMA | 754 | 1,074 | 253 | 733 | 66 | 64 | 2,944 |
| Saskatchewan | 2,447 | 2,118 | 802 | 871 | 84 | 156 | 6,478 |
| Calgary CMA | 877 | 1,870 | 702 | 94 | 43 | 59 | 3,645 |
| Edmonton CMA | 533 | 2,387 | 870 | 642 | - | - | 4,432 |
| Alberta | 1,835 | 5,765 | 2,362 | 960 | 68 | 153 | 11,143 |
| Kelowna CMA | 287 | 1,359 | 537 | 193 | - | - | 2,376 |
| Abbotsford-Mission CMA/Vancouver CMA | 1,562 | 5,813 | 3,774 | 1,554 | 110 | 238 | 13,051 |
| Victoria CMA | 351 | 1,593 | 891 | 475 | 81 | 297 | 3,688 |
| British Columbia | 3,551 | 13,085 | 8,874 | 3,643 | 331 | 710 | 30,194 |
| **Canada** | **72,961** | **92,513** | **29,671** | **7,972** | **11,625** | **9,600** | **224,342** |

[1] For Quebec, figures include single-occupancy room and board units, and bachelor units with kitchens.

[2] In Quebec, these spaces have full kitchens. In other provinces these unit types typically do not have full kitchens.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

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## 2.2 Universe of Standard Spaces for Provinces and Selected Major Centres by Rent Range

| | less than $1,500 | $1,500 - $1,999 | $2,000 - $2,499 | $2,500 or more |
|---|---|---|---|---|
| | % of Total | % of Total | % of Total | % of Total |
| Newfoundland and Labrador | ** | 43.6 | 35.8 | 20.6 |
| Prince Edward Island | 19.5 | ** | ** | ** |
| Nova Scotia | 3.3 | 12.4 | 10.9 | 73.5 |
| New Brunswick | 38.7 | 20.0 | 28.3 | 13.0 |
| Montreal CMA | 39.0 | 39.8 | 12.8 | 8.4 |
| Ottawa - Gatineau CMA (Que. part) | 13.5 | 45.8 | 21.8 | 18.9 |
| Québec CMA | 34.2 | 47.3 | 12.1 | 6.5 |
| Saguenay CMA | 63.0 | 31.0 | 6.0 | 0.0 |
| Sherbrooke CMA | 52.5 | 41.3 | 5.8 | 0.5 |
| Trois Rivières CMA | 49.5 | 35.4 | 12.0 | 3.1 |
| Quebec | 44.7 | 39.5 | 10.4 | 5.4 |
| Barrie CMA | 1.2 | 13.6 | 23.9 | 61.4 |
| Brantford CMA | 5.3 | 12.0 | 7.7 | 75.1 |
| Guelph CMA | 0.9 | 6.3 | 6.1 | 86.6 |
| Hamilton CMA | 0.3 | 5.1 | 16.3 | 78.3 |
| Kingston CMA | 0.3 | 5.6 | 3.3 | 90.8 |
| Kitchener-Cambridge-Waterloo CMA | 0.2 | 5.4 | 5.8 | 88.6 |
| London CMA | 0.4 | 2.0 | 11.6 | 86.0 |
| St. Catharines-Niagara CMA | 4.9 | 12.5 | 26.6 | 56.0 |
| Oshawa CMA | ** | 2.5 | 3.2 | 94.3 |
| Ottawa - Gatineau CMA (Ont. part) | 0.2 | 6.4 | 10.5 | 82.8 |
| Peterborough CMA | ** | 10.3 | 7.5 | 82.2 |
| Greater Sudbury CMA/Grand Sudbury CMA | ** | 2.8 | 11.5 | 85.7 |
| Thunder Bay CMA | ** | ** | ** | ** |
| Toronto CMA | 2.2 | 1.0 | 7.3 | 89.6 |
| Windsor CMA | 2.1 | 4.3 | 22.5 | 71.0 |
| Ontario | 2.0 | 7.5 | 13.5 | 77.0 |
| Manitoba | 2.2 | 12.9 | 33.4 | 51.4 |
| Regina CMA | ** | 2.4 | 11.1 | 86.6 |
| Saskatoon CMA | 12.3 | 13.3 | 13.9 | 60.5 |
| Saskatchewan | 5.8 | 12.8 | 21.8 | 59.6 |
| Calgary CMA | ** | 0.0 | 12.3 | 87.7 |
| Edmonton CMA | 12.8 | 5.8 | 22.1 | 59.3 |
| Alberta | 5.2 | 7.2 | 20.7 | 66.9 |
| Kelowna CMA | 1.6 | 15.6 | 29.8 | 53.0 |
| Abbotsford-Mission CMA/Vancouver CMA | 6.3 | 9.0 | 15.8 | 68.9 |
| Victoria CMA | 4.3 | 4.9 | 17.3 | 73.5 |
| British Columbia | 7.8 | 10.7 | 20.9 | 60.5 |
| **Canada** | **25.9** | **25.4** | **13.7** | **34.9** |

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 2.3 Universe, Number of Spaces, Number of Residents living in Universe and Capture Rate by Province

| | Number of Residences | Number of Spaces | Number of Residents | Estimated Population Aged 75+[1,2] | Capture Rate[3] (%) |
|---|---|---|---|---|---|
| Newfoundland and Labrador | 42 | 2,299 | 2,045 | 36,900 | 5.5 |
| Prince Edward Island | 23 | 953 | ** | 11,600 | ** |
| Nova Scotia | 38 | 1,443 | 1,439 | 75,100 | 1.9 |
| New Brunswick | 52 | 2,140 | ** | 60,100 | ** |
| Quebec | 1,300 | 111,973 | 115,399 | 622,736 | 18.5 |
| Ontario | 677 | 53,680 | 50,987 | 980,288 | 5.2 |
| Manitoba | 36 | 4,039 | 4,309 | 85,300 | 5.1 |
| Saskatchewan | 167 | 6,478 | 6,426 | 78,600 | 8.2 |
| Alberta | 105 | 11,143 | 11,307 | 206,600 | 5.5 |
| British Columbia | 354 | 30,194 | 30,198 | 356,765 | 8.5 |
| **Canada** | **2,794** | **224,342** | **224,962** | **2,513,989** | **8.9** |

[1] Due to the different sources of population estimates, figures do not sum to the Canada total.

[2] Source: British Columbia: Current Population Estimates, P.E.O.P.L.E. 2014, BC Statistics.

Atlantic: Statistics Canada Publication 91-520-X (Population Projections for Canada, Provinces, and Territories) - Table 11

Alberta, Manitoba, Saskatchewan: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

Ontario: Statistics Canada estimates, 2011, and Ontario Ministry of Finance projections released Fall 2014. Reference scenario projection July 1, 2015.

Québec: Statistics Canada, Demographics Division; Institut de la statistique du Québec, Perspectives démographiques du Québec et des régions, 2011-2061; and CMHC, calculations.

[3] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

## Definitions

**Space:** A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

**Standard space:** A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

**Heavy care space:** A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

**Respite space:** A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

**Non-market or subsidy space:** A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

**Rent:** The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

**Vacancy:** A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

**Capture rate:** The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

**Acknowledgement**
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

**Confidentiality**
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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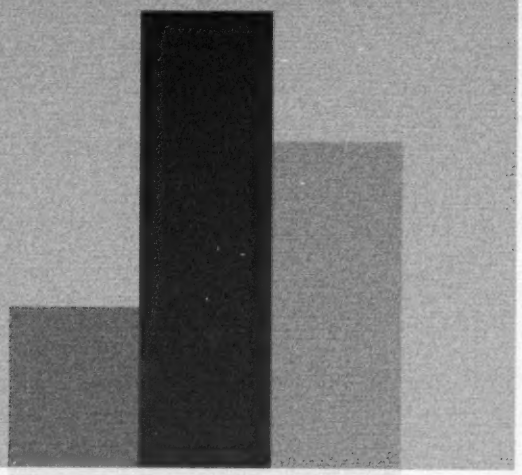

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